

RESEARCH BRIEF

FROM THE CENTER FOR MEDIA RESEARCH

TV Still Occupies Two Thirds of Adult Screen Time

Jack Loechner, Apr 17, 2009 08:15 AM

The new Video Consumer Mapping (VCM) study for the Council for Research Excellence (CRE) by Ball State University's Center for Media Design (CMD) finds that younger baby boomers (age 45-54) consume the most video media, and confirms that traditional live television remains the "800-pound gorilla" in the video media arena. The VCM study generated data covering more than three-quarters of a million minutes and a total of 952 observed days.

In addition to the revelation that consumers in the 45-54 age group average the most daily screen time (just over 9 1/2 hours), the VCM study found the average for all other age groups to be strikingly similar at roughly 8 1/2 hours, although the composition and duration of devices used by the respective groups throughout the day varied.

According to the report, the research found that:

- Contrary to some recent suggestions that more Americans are rediscovering "free TV" via the Internet, computer video tends to be quite small with an average time of just two minutes (a little more than 0.5 percent) a day
- Despite the proliferation of computers, video-capable mobile phones and similar devices, TV in the home still commands the greatest amount of viewing, even among those ages 18-24
- Even in major metropolitan areas where commute times can be long and drive-time radio remains popular, computer use has replaced radio as the No. 2 media activity. Radio is now No. 3 and print media fourth
- TV users were exposed to, on average, 72 minutes per day of TV ads and promos, dispelling a commonly held belief that modern consumers are channel-hopping or otherwise avoiding most of the advertising in the programming they view.
- Early DVR owners spent much more time with DVR playback than newer DVR owners. At the same time, DVR playback was even more likely than live TV to be the sole medium.
- "Environmental" exposure outside the home, while still relatively small at just 2.8 percent of total video consumption today, could nearly double during the next few years.

Average Daily Minutes of Media Consumption (Spring and Fall 2008)							
<i>Minutes of Media by Age Group</i>							
<i>Media</i>	<i>Total Adults 18+</i>	<i>18-24</i>	<i>25-34</i>	<i>35-44</i>	<i>45-54</i>	<i>55-64</i>	<i>65+</i>
Live TV	309.1	209.9	256.0	230.4	335.7	346.1	420.5
Playback TV via DVR/TiVo	14.6	17.2	15.9	17.2	19.4	8.5	7.2
DVD or VCR	22.9	34.0	35.4	27.4	20.6	14.0	11.4
Console Games	6.5	25.9	13.9	4.9	3.0	1.2	0.3
Television Total	353.1	287.0	321.2	279.9	378.7	369.7	439.4
Any Web	48.8	67.0	55.7	74.1	46.0	41.7	19.2
Email	37.4	20.3	45.1	46.5	51.4	37.8	11.1

IM	7.9	14.8	2.9	14.6	15.1	0.0	0.3
Any Software	46.1	61.8	50.3	61.6	52.1	35.8	15.6
Computer Video	2.4	5.5	4.3	2.6	2.0	1.2	0.2
Computer Total	142.5	169.5	158.3	199.3	166.4	116.5	46.5
Mobile Talk	16.6	29.1	19.0	24.7	17.8	12.3	3.1
Mobile Text/Multimedia Messaging	2.2	11.6	2.2	2.1	1.3	0.4	0.1
Mobile Web	0.9	0.8	2.3	0.6	0.7	1.3	0.0
Mobile Other (Video, Camera, Games etc.)	0.5	1.1	0.6	0.6	0.5	0.2	0.1
Mobile Video	0.1	0.1	0.0	0.1	0.1	0.0	0.0
Mobile Total	20.2	42.8	24.0	28.0	20.5	14.2	3.2
Environmental/Other Video	4.4	9.2	4.9	2.6	4.8	4.1	3.6
In-Cinema Movie	1.8	1.2	1.6	3.1	0.6	3.0	2.0
GPS Navigation	2.0	0.0	1.2	0.3	2.6	4.1	3.8
Other Total	8.2	10.4	7.6	5.9	8.0	11.1	9.4
Total	524.0	509.7	511.1	513.1	573.6	511.5	498.5
<i>Source: Video Consumer Mapping Study, March 2009</i>							

Additional key findings noted in the report:

- Although the composition of consumers' screen media time varied across age groups, their total screen time was strikingly similar
- The degree of concurrent screen media exposure (also referred to as media multitasking) was equivalent for all age groups under 55.
- The study confirmed that 99% of Nielsen's Three-Screen Time is TV. Even among Adults 18-24, TV was more than 98%
- Live TV led all video time by a large margin, followed by DVDs, with DVRs
- The study suggests that computing has displaced radio as the number two media activity. Radio is now number three and print is number four
- New HDTV ownership (first or second set) led to higher TV exposure, though some of this increase appeared to be temporary
- A higher percentage of TV time was spent as sole medium compared with computers, print or audio.
- TV users were exposed to on average roughly an hour a day of live TV ads and promos

Mike Bloxham, director of insight and research for Ball State's CMD, observes that "What differentiates this study... (is that) it's not a study about TV or the Web or any other medium... it's about how, where, how often and for how long consumers are exposed to all media... the observational method is the only real way to achieve accurate and reliable results."